NIH Enterprise Directory (NED)

User Guide

NEDWeb AO/AT Interface

Table of Contents

Overview

The NIH Enterprise Directory (NED) is a directory containing contact and organizational information (e.g., phone/fax numbers, building, room, mail stop, IC, organizational unit) for all people working at NIH, or using NIH services and facilities. This includes NIH employees, contractors, fellows, guests, volunteers, and tenants. "**NEDWeb"** is the custom web application used by NIH administrative personnel for the purpose of adding new people to NED, updating existing records, transferring workers between ICs, and deactivating people when they leave NIH. NEDWeb is also used to authorize ID badges, NIH Library privileges, and listing in the NIH Telephone and Services Directory. NEDWeb provides the following features and capabilities:

- Work flow between data entry personnel and approvers
- Scheduled Actions (the ability to enter information ahead of time and have it automatically added to the directory on a specified future date)
- Event driven e-mail notification
- Extensive reporting capabilities
- Integration with NIH Login
- User Administration

This document provides detailed information on the use of NEDWeb and is intended to serve as a reference guide for system users. Please direct comments or suggestions to Tom Bodine.

Accessing NEDWeb

To access NEDWeb, you must first be setup up as a user by someone in your IC, typically your NED IC coordinator (NIC). All users are setup as either Administrative Officers (AOs) or Administrative Technicians (ATs). This does not mean your official NIH job title is AO or AT. The AO and AT designations are simply used for assigning different system privileges to NEDWeb users. AOs have the ability to enter data **and** commit changes to NED, while ATs can only enter data. After data is entered by an AT it must be submitted to an AO for review and if approved, NED is updated. AOs are also able to perform various administrative functions such as adding new users, modifying access privileges of existing users, and deleting users.

NEDWeb is password protected to prevent unauthorized system access. After you have been authorized to use NEDWeb (i.e., setup as an AO or AT), your NIH Login is required to access the application. To log on:

1. Launch a web browser (e.g., Internet Explorer, Firefox, Netscape, Safari).
2. Point your browser to: https://nedadmin.nih.gov to access the NIH Login screen.
3. Enter your NIH Login user name and password, then click the "Log in" button.
4. If your NIH Login is successful, the NEDWeb *Main Menu* is displayed

If you are having problems with your NIH Login, please contact the NIH Help Desk at 301-496-HELP for assistance.

NEDWeb is also accessible from the NIH Portal (https://my.nih.gov). To access from the Portal it is first necessary to install the *Launch NEDWeb* gadget on your Portal "My Pages". To install the *NEDWeb Launch Pad* gadget:

1. After logging on to the Portal, select the "Choose Gadgets" link that is displayed at the top of the Portal "My

Pages".
2. Enter "nedweb" in the "Search for Gadgets" text box and then click "Go".
3. You should now see "NEDWeb Launch Pad" displayed on your screen.
4. Click the checkbox appearing next "NEDWeb Launch Pad and then the "Finish" button in the upper right hand corner of your screen.
5. You should be returned to "My Pages" with the *NEDWeb Launch Pad* gadget displayed.
6. Click the *Launch NEDWeb* link to open a new window that displays the NEDWeb *Main Menu*.

If you need assistance installing the *NEDWeb Launch Pad* gadget, please contact the NIH Help Desk at 301-496-HELP.

Main Menu

Following successful login, the NEDWeb *Main Menu* is displayed with the following options:

- Register
- Update
- Search (View Only)
- Change Status
- Review Requests
- Administration
- Reports

Register

Selecting *Register* initiates the process of adding, or "registering" a new person in NED. As mentioned above, ATs can input registration information, but the new record will not be created in NED until approved by an AO. You are always limited to registering people in your own IC and may be further restricted based on your assigned SAC coverage. The registration process consists of two main steps: 1) performing a registration search, and 2) entering information about the person that will be contained in his or her NED record.

The purpose of the registration search is to determine whether the person you are attempting to register already has a record in NED. This is important because when a person leaves NIH, their NED record is deactivated, but not deleted from system. If the person returns to NIH at a later date a new record should not created. Instead, the existing record should be activated. The creation of a duplicate record can lead to problems in obtaining an ID badge and other

NIH services. The registration search involves entering identifying information for a person such as their name, SSN, and DOB and comparing this against existing information in NED. If a match is found, you activate the record and update it accordingly. If no match is found, a new record is created. To register a new person in NED:

1. From the *Main Menu*, select *Register*. The "registration search" page is displayed.

2. Select a "Classification" for the person from the drop down list. Classifications include NIH FTE, Fellow, Guest, Contractor, Volunteer, and Tenant and are described in the following table.

Classification	Description
NIH FTE	All NIH FTEs. Includes General Schedule (GS), Commissioned Corps, Senior Executive Service (SES), Senior Biomedical Research Service (SBRS), Special Expert, and Title 42 employees including Clinical/Research Fellows.
Fellow	All individuals who receive monthly stipends from NIH. Includes Intramural Research Training Award (IRTA) Fellows and Visiting Fellows
Guest	All non-paid individuals who work at NIH pursuing primarily their own interests. Includes Exchange Scientists, Guest Researchers, and Professional Services Contractors.
Contractor	Non-NIH employees who are paid by NIH for services rendered via a procurement vehicle.
Volunteer	All non-paid individuals who work for NIH primarily on NIH programs. Includes Special Volunteers.
Tenant	Employees of non-NIH organizations that lease and utilize NIH space. Includes on-site employees of the DHHS Office of the General Counsel (OGC) and the FDA Center for Biologics Evaluation and Research (CBER).

Table 1 - NED Classifications

3. If the person is a summer employee, click the "Yes" radio button.

4. Certain fields are required for a registration search depending on the classification of the person being registered. These are marked by "▸" appearing to the right of a field name. Required fields for a registration search are summarized in the following table.

Classification	Required Fields for a Registration Search
NIH FTE	First Name, Last Name, SSN, Date of Birth
Fellow	First Name, Last Name, and **either** City of Birth, Country of Birth, Date of Birth **or** SSN
Guest	First Name, Last Name, and **either** City of Birth, Country of Birth, Date of Birth **or** SSN
Contractor	First Name, Last Name
Volunteer	First Name, Last Name
Tenant	First Name, Last Name

Table 2 - Required Fields for a Registration Search

5. After entering values for all required fields click the "Submit" button at the bottom of the page to initiate the registration search. As mentioned above, the purpose of the registration search is to determine whether the person you are attempting to register already has a record in NED (e.g., the person may have worked at the NIH in the past, but left).

6. If no matches are found, click the "Register New" button and proceed to step #8. ("Register New" indicates that the registration search has determined that the person does exist in NED and you will be creating a new record.)

7. If the search returns a match that appears to be the same person you're registering, click the "Activate" button to the right of the person's name.

8. The Services page allows you authorize various NIH "services" for the person being registered. These include:

- ID Badge/card key
- List in the "paper directory" (the NIH Telephone and Services Directory)
- NIH Library privileges

ID Badge - NED is connected to the ORS/DPS ID badge/card key system and **a person must be authorized using NEDWeb in order to receive an NIH ID badge**. Under the ID badge section of the Services page, the person's "badge status" is displayed as either "Authorized" or "Not Authorized" depending on the classification selected in step #2. When registering an NIH FTE or Fellow, badge status defaults to "Authorized" so if the NIH FTE or Fellow should be authorized for a badge, no action is required. If an FTE an Fellow does not require a badge, select the "Do Not Authorize" radio button appearing below the badge status line. When registering a contractor, guest, volunteer or tenant, badge status defaults to "Not Authorized" and you must click the "Authorize" radio button in order to authorize this person for a badge. No action is required if the contractor, guest, volunteer, or tenant should not be authorized for a badge.

When authorizing a badge, a default expiration date is calculated and entered automatically in the "Expiration Date" field based on the classification of the person being registered . By default, FTE and Fellow badges are issued for four years and all other classifications for two years. For security reasons, the default badge expiration date should be changed to coincide with how long the person is expected to work at NIH if this is known at the time of the registration. The badge expiration date can be changed by entering a new date in the Expiration Date field or selecting one using the popup calendar.

Some people require that a "badge designation" be printed on their ID badge. This generally applies to patient care workers and Clinical Center employees even if they do not work with patients. To authorize a badge designation, select one from the drop down list. If you are unsure whether this is required for the person you are registering, contact your NED IC Coordinator (NIC). Also, you can always leave this blank and then go back and add a badge designation as an update after the person has been registered.

List in Paper Directory - NED Information is used in the Personnel Listing section of the NIH Telephone and Services Directory (i.e., the "paper directory"). This includes: preferred name, telephone, IC, building, room, MSC, fax, and classification. NIH FTEs, Fellows, and tenants are listed by default so no action is required if the person is an NIH FTE, Fellow, or tenant. To list a contractor, volunteer, or guest, select the "List in paper directory" radio button. **A person must be authorized using NEDWeb in order to be listed in the paper directory**.

NIH Library - NED is connected to the NIH Library's patron database and **a person must be authorized using NEDWeb in order to obtain full Library privileges (e.g., the ability check out Library materials).** Library authorization via NEDWeb replaces the old paper-based process using NIH Form 1948. NIH FTEs are automatically authorized for Library privileges so no action is required when registering an FTE. To authorize Library privileges for a Fellow, contractor, volunteer, guest, or tenant, click the "Authorize" radio button appearing below the NIH Library Privileges "Status" line.

After making your service selections, click the "Continue" button at the bottom of the screen to proceed with the registration.

9. Enter information on the *Personal Information* form. Depending on the classification of the person being registered, certain fields are required. These are marked by "▸" appearing to the right of field names. The table below lists the fields included on the *Personal Information* form and indicates which are required for each of the classifications.

Field Name	Description	Required For Which Classifications?
First Name	Legal Given Name (free form text)	All
Last Name	Legal Surname (free form text)	All
Middle Name	Legal Middle Name (free form text)	None
Title	Mr, Mrs, Dr, etc. (drop down list)	NIH FTE, Fellow, Guest
Generation	Jr., III, etc. (drop down list)	None
Suffix	Educational degrees or other descriptor; MD, PhD, RN, etc.	None
Preferred Name	A "commonly known as" name that's different from a person's legal name (e.g., Bob vs. Robert, or maiden name); displayed in the NIH Telephone Directory if the person is listed	None
Gender	M, F, or Unknown (drop down list)	NIH FTE, Fellow, Guest
SSN	Must be in format: 012-34-5678 or 012345678	NIH FTE
US Citizen	Yes or No (radio button)	NIH FTE, Fellow, Guest
Date of Birth	Must be in format: 01/01/1968 or 01-01-1968	NIH FTE, Fellow, Guest
City of Birth	Free form	NIH FTE, Fellow, Guest
State of Birth	Drop-down list	None
Country of Birth	Drop-down list (defaults to "United States" if a state of birth is selected)	NIH FTE, Fellow, Guest
Other Name(s)	e.g., nicknames, maiden name (free form text)	None
Comments	Additional information (free form text with 512 character limit)	None

Table 3 - Fields Included on the Personal Information Form

When you've finished entering information on the *Personal Information* form, click the *Work Information* tab to continue.

10. Enter information on the *Work Information* form. As with personal information, certain fields are required depending on the classification of the person being registered. Required fields are marked by "▸" appearing to the right

of field names. The table below summarizes the fields included on the *Work Information* form and which are required based on the classification of the person being registered.

Field Name	Description	Required for Which Classifications?
Directory Status	Active, Inactive, Transferring, Suspended (drop down list)	All
Classification	NIH FTE, Fellow, Guest, Volunteer, Contractor, Tenant (drop-down list)	All
Summer Employee	Yes or No (radio button)	All
EOD	"Entrance on Date" The date a person starts working at NIH (does not include other government agencies). Must be in format: 01/01/1968 or 01-01-1968	None, but defaults to the date the person is registered in NED if left blank
NTE Date	"Not to Exceed" Date. The ending date of a person's appointment.	None
IC	NIH "Institute or Center". Assigned automatically based on the user's IC affiliation.	All
SAC	"Standard Administration Code" (e.g., HNU14); drop down list. Represents the person's organizational unit within the IC.	All
Organizational Unit	e.g., Network Systems Branch (automatically inserted based on SAC)	All
IPD	Intramural Professional Designation (e.g., Senior Investigator, Postdoc Fellow)	All except Tenant when when an intramural SAC is selected
Org. Title	e.g., Lab Chief, Program Director (free form)	None
Phone	Must be in format: 800-555-1212 (x1234 optional)	None
Fax	Must be in format: 800-555-1212 (x1234 optional)	None
Mobile Phone	Must be in format: 800-555-1212 (x1234 optional)	None
Pager	Must be in format: 800-555-1212 (x1234 optional) or 104-1234 (a "7" following 1234 is optional)	None
TTY	Must be in format: 800-555-1212 (x1234 optional)	None

Building	e.g., 45, 12A, ARC (drop down list)	None
Room	e.g., 4039, 2B345 (rooms in most buildings are validated)	None
Mail Stop	e.g., 2551 (free form)	None
Delivery Address	for FedEx, UPS, etc. (max. 30 characters per line w/six lines)	None
Postal Address	for US Postal Service mail delivery (max. 30 characters per line w/six lines)	None
E-mail	jsmith@mail.nih.gov (must be valid email address format)	None
Web Site URL	http://www.nih.gov (must be valid Web URL format)	None
Contractor Affiliation	Company for whom the contractor works (only displayed when registering a contractor)	Contractor
Contractor Phone	Must be in format: 800-555-1212 (only displayed when registering a contractor)	None
AD Domain\User Name	Used for NIH Login and cannot be added during a registration. May be automatically populated after the person is registered; if not this must be added by the NIH Help Desk.	None

Table 4 - Fields Included on the Work Information Form

Depending on what services were authorized during step #8, certain fields also become required on the Work Information form. These are marked by "▸" appearing to the right of a field name. The following table summarizes the required information for each service:

Field Name	ID Badge	List in Paper Directory	NIH Library
Work Phone	Y	Y	Y
Building	Y	Y	Y
Room	Y	Y	Y
Mail Stop Code		Y	

Table 5 - Required Fields for NIH Services

When finished entering information on the *Work Information* form, click the *Home Information* tab.

11. Enter information on the *Home Information* form. There are no required fields on this form. The fields included on the *Home Information* form are summarized in the table below.

Field Name	**Description**	**Required for Which Classifications?**
Home E-mail	janedoe@aol.com (Free form, but must include @)	None
Home Phone	Must be in format: 800-555-1212 (x1234 optional)	None
Home Fax	Must be in format: 800-555-1212 (x1234 optional)	None
Home Mobile Phone	Must be in format: 800-555-1212 (x1234 optional)	None
Home Pager	Must be in format: 800-555-1212 (x1234 optional)	None
Home Mailing Address	Maximum 30 characters per with six lines	None
Emergency Contact Name	Free form	None
Emergency Contact Phone	Must be in format: 800-555-1212 (x1234 optional)	None
Emergency Contact Description	Free form	None

Table 6 - Fields Included on the Home Information Form

When finished entering information on the *Home Information* form, click "Continue" at the bottom of the form to proceed.

12. Note: This step applies only if you are an Administrative Technician (AT); Administrative Officers (AOs) proceed to step #13. In cases where multiple AOs have SAC coverage for the person being registered, select an approving AO from the list and click "Continue" to create a "Pending Request" that will be forwarded to the AO for review.

13. Assuming you've entered information for all required fields, a screen is displayed allowing you to verify the information that has been entered. If any required fields have been left blank, an "Oops" page displays the missing fields and you must go back and fill them in. Verification is optional--if you do not want verify the information entered, proceed to step #14. To verify information, check the appropriate box (All, Services, Personal, Work, or Home) and click "Verify" to display the information that has been entered. If you are satisfied, click the "Confirm" button at the bottom of the page. If you see something that needs to be added or corrected, click the "Modify" button and proceed to the appropriate form (Services, Personal, Work, or Home) to make the necessary changes. When finished, click the "Continue" button at the bottom of any form.

14. Enter an "Effective Date" for the registration or select one using the popup calendar. This is the date you want the person's record added to NED. The effective date defaults to the current date so no action is required if you want the person added immediately following AO approval. To schedule the registration for a future date, enter a different date or select one using the popup calendar. Selecting a future date creates a "scheduled action". Scheduled actions are stored outside of NED and are executed at approximately 5:30 a.m. on the scheduled date. (Note: You will not find the person's record in NED if you search for it prior to the scheduled date!)

15. To complete the registration process, click the "Submit Registration" button. If you are an AT, the registration request is moved to the pending requests queue of the AO selected in step #12 and the AO is notified of the request via e-mail . If you are an AO, the person's record is created (unless the registration was scheduled) and a confirmation message displayed indicating that the person has been added to NED.

Update

The "Update" option on the *Main Menu* is used to modify entries for people already in NED. As with registrations, ATs can enter changes, but these must be approved by an AO before NED is updated. **Note: Classification cannot be changed via *Update*.** This is done via the *Change Status Menu* and entails deactivating a person's record and then activating it with the new classification. The process for all other updates is as follows:

1. Find the record for the person you want to update. From the *Main Menu*, select *Update*. The "update search" page is displayed with fields for NIH ID, SSN, first name, and last name.

2. Enter information to be used for the search. There are no required fields, but a value must be entered in at least one of the fields. Search values are not case sensitive. Click the "Submit" button to initiate the search.

3. Review the search results to see if the entry for the person you want to update was found. Search results are displayed under one of two categories: "Matches Available for Update" and "Matches Not Unavailable for Update." The former includes people in your IC whose directory status is active or suspended. An "Update" button appears to the left of each of these names. "Matches Unavailable for Update" include people within your IC whose directory status is transferring, people from other ICs, and all inactive entries in NED. You are not able to update these entries. If the entry for the person you want to update appears as "available for update", click the "Update" button to access the *Services*, *Personal Information*, *Work Information*, and *Home Information* update forms.

(Note: As with other NED actions, you can only perform updates on entries within your SAC coverage. Clicking the "Update" button for an entry outside your coverage displays the popup message "This individual is not in your coverage" and you are prevented from updating the entry.)

4. Enter your updates on the Services, Personal Information, Work Information, and/or Home Information forms. For certain records, you will notice that some of the fields cannot be updated. These are marked by an "" icon displayed to the right of the field. This indicates that the person's NED record is "linked" to a record in one more external, or "connected systems". For these fields, NED downloads its information from the connected system(s). Connected systems include the Human Resources Database (HRDB), the Fellowship Payment System II (FPS2), and the John E. Fogerty International Center (JEFIC) database. NED assumes that information coming from connected systems is "authoritative" and therefore does not allow it to be updated in NEDWeb. If information in a connected system is incorrect, it will also be wrong in NED. In these cases, the correction must be made in the connected system and it will then be downloaded into NED. Download intervals for connected systems vary. HRDB downloads occur within a few days following the end of each pay period, while FPS2 downloads occur every night. The JEFIC download typically occurs during the first week of each month. The following table summarizes information that cannot be updated in NEDWeb as a result of a person's NED record being linked to records in one or more connected systems. For example, if a person's NED record is linked to a record in HRDB their name, gender, SSN, date of birth, citizenship status, IC/SAC, and home address cannot be updated in NEDWeb because the authoritative source is HRDB.

Field Name	HRDB	HRDB & JEFIC	FPS2	FPS2 & JEFIC	JEFIC
Name	HRDB	HRDB	FPS2	FPS2	JEFIC
Gender	HRDB	HRDB		JEFIC	JEFIC
SSN	HRDB	HRDB	FPS2	FPS2	
Date of Birth	HRDB	HRDB		JEFIC	JEFIC
Place of Birth		JEFIC		JEFIC	JEFIC
US Citizen	HRDB	HRDB		JEFIC	JEFIC
IC	HRDB	HRDB	FPS2	FPS2	JEFIC
SAC	HRDB	HRDB			

Home Address	HRDB	HRDB	FPS2	FPS2	

Table 7 - Authoritative Source for Information When a Person Has a Record in a Connected System

When finished with your updates, click the "Continue" button at the bottom of the form. If you are an AT, and there are multiple AOs with SAC coverage for the person whose record is being updated, you will be asked to select an approving AO from the list. Select an AO and click "Continue" to go to the submit screen. If you are an AO, clicking "Continue" takes you directly to the submit screen.

5. Before submitting the update, you can verify the information in the person's record, but this is optional. To verify your changes, follow the same procedure that is used in register, step #13. If you do not want to verify the information, click the "Submit Update" button. If you are an AO, NED processes the update immediately and displays an on screen update confirmation message. If you are an AT, the update request if moved to the pending requests queue of the AO selected in step 4 and the AO notified via email.

Authorizing a Replacement ID Badge

Authorizing a person for a replacement ID badge is done as an Update. Examples of replacement badges include renewing a badge that is about to expire or authorizing a replacement in the case of a lost or broken badge. As with other actions relating to ID badges, authorizing a replacement badge is done on the Services tab. To authorize a replacement badge:

1. Follow steps 1-3 above under Update, then click the Services tab

2. On the ID Badge line of the Services tab, it should say "Status: Issued" with the badge expiration date appearing to the right in parentheses. (If it displays "Status: Authorized", then means someone has already authorized a replacement badge and no further action is required.)

3. Click a badge issue reason. These include: Renew, Lost, Stolen, Broken, Name Change, and Add/Change/Delete Designation.

4. Click the "Continue" button at the bottom of the screen. If you are an AT, and there are multiple AOs with SAC coverage for the person whose record is being updated, you will be asked to select an approving AO from the list. Select an AO and click " Continue" to go to the submit screen. If you are an AO, clicking the "Continue" button takes you directly to the submit screen.

5. Before submitting the update, you can verify the information in the person's record, but this is optional. To verify your changes, follow the same procedure that is used in register, step #13. If you do not want to verify the information, click the "Submit Update" button. If you are an AO, NED processes the update immediately and displays an on screen update confirmation message. If you are an AT, the update request if moved to the pending requests queue of the AO selected in step 4 and the AO notified via email.

Search (View Only)

The *Search* option on the *Main Menu* allows you to perform a "view only" search of NED. Updates cannot be performed via the Search option so this would be used in cases were you simply want to view information contained in a person's record without making any changes. To perform a view only search:

1. From the *Main Menu*, select *Search*. The search form includes NIH ID, first name, last name, and e-mail address plus drop down lists for filtering by IC and worker classification. There are no required fields, but you must enter a value in at least one of the fields. Information entered on the search form is not case sensitive.

2. Enter the desired search values and click the "Search" button to initiate your search. Search results are displayed alphabetically by last name.

3. The initial search results screen displays a person's name, IC, directory status, classification, and email address. To view additional information in a person's record, click on their name. If the person is outside your SAC coverage, only *Work Information* is displayed. If they are included in your coverage *Services*, *Personal*, and *Home Information* is also displayed.

Change Status

All NED records have a "directory status" of either: active, inactive, transferring, or suspended. When a person is registered in NED they are assigned a directory status of active. This indicates that the person is currently working at NIH and has been authorized by an AO to utilize NIH services and/or facilities. Subsequent changes to a person's directory status are made via the *Change Status* option menu on the *Main Menu*. The four options on the Change Status menu are: Deactivate, Transfer, Activate, and Suspend. These are described below.

Deactivate

When a person leaves NIH their directory status should be changed to inactive. This process is referred to as a "deactivation". Deactivated records are not deleted from NED, but remain in the system with a directory status of "inactive". This allows a person to have the same NIH ID if they return to work at NIH in the future. To deactivate a person's record:

1. Find the record of the person you want to deactivate. From the *Main Menu*, select *Change Status*--> *Deactivate*. The "deactivation search" page is displayed with fields for NIH ID, SSN, first name, and last name.

2. Enter information to be used for the search. There are no required fields, but a value must be entered in at least one of the fields. Search information is not case sensitive. Click the " Submit" button to initiate the search.

3. Review your search results. Search results are displayed under one of two categories: "Individuals Available to Deactivate" or "Individuals Unavailable to Deactivate." The former includes people in your IC with a directory status of active, transferring, or suspended and a "Deactivate" button appears to the left of each name displayed here. Names listed under "Individuals Unavailable to Deactivate" include all inactive entries and people from other ICs regardless of their directory status. Deactivate buttons do not appear next to these names because you cannot deactivate an entry that is already inactive or a person outside your own IC.

4. If your search returns the person you want to deactivate and they are "available to deactivate", click the "Deactivate" button next to the person's name. This takes you to the submit form.

(Note: As with other NED operations, you can only perform deactivations on entries included in your assigned SAC coverage. Clicking the "Deactivate" button for an entry outside your coverage displays the popup message: "This individual is not in your coverage" and you are prevented from deactivating the entry.)

5. Set the "effective date" for the deactivation. Since NEDWeb automatically inserts the current date as a default, no action is necessary if the deactivation should be immediate. To schedule the deactivation for a future date, enter it here or select one using the popup calendar.

6. Click the "Submit Status Change" button. A popup message asks if you're sure you want to deactivate this individual. Click "Cancel" to abort or "OK" to complete the deactivation process.

Note: Deactivating a NED record revokes any NED services that had been authorized for the person. These include:

- ID badge/card key access
- NIH Library privileges
- Listing in the NIH Telephone and Services Directory ("paper directory")

Auto-Deactivate

It is possible for a person to be automatically deactivated in NED without any action being taken by an AO or AT. This is referred to as an "auto-deactivate". Auto-deactivates occur as a result of changes to records in systems that are connected to NED. Connected systems include the Human Resources Database (HRDB), the Fellowship Payment System (FPS2), and the John E. Fogarty International Center (JEFIC) database. As mentioned previously, NED runs an automated process that attempts to "link" records with corresponding records in connected systems. Once links are established, changes to records in connected systems may affect linked records in NED. Auto-deactivations occur when linked records "drop out" of connected systems or become inactive and are thus deactivated in NED as well. For example, if a Fellow's NED record is linked to a record in FPS2 and the Fellow drops out of FPS2, his or her NED record will be auto-deactivated. The same could apply for NIH FTEs in HRDB and visiting scientists in JEFIC.

Note: An auto-deactivate of a NED record revokes any NED services that had been authorized for the person. These include:

- ID badge/card key access
- NIH Library privileges
- Listing in the NIH Telephone and Services Directory ("paper directory")

Suspend

A directory status of "suspended" is generally assigned to a person who is being placed on administrative leave, but is expected to return. To change a person's directory status to suspended:

1. Find the record of the person you want to suspend. From the *Main Menu*, select *Change Status*--> *Suspend*. The "suspend search" page is displayed with fields for NIH ID, SSN, first name, and last name.

2. Enter information to be used for the search. There are no required fields, but a value must be entered in at least one of the fields. Search information is not case sensitive. Click the " Submit" button to initiate the search.

3. Review your search results. Search results are displayed under one of two categories: "Individuals Available to Suspend" or "Individuals Unavailable to Suspend." The former includes people in your IC with a directory status of active or transferring. A "Suspend" button appears to the left of each name displayed here. Names displayed under "

Individuals Unavailable to Suspend" include all entries with a status of inactive or suspended and people from other ICs regardless of their directory status. Suspend buttons do not appear next to these names because you cannot suspend an entry that is already inactive or suspended, or belongs to a person outside your own IC.

4. If your search returns the person you want to suspend and their entry is "available to suspend", click the "Suspend" button next to the person's name. This will take you to the submit form.

(Note: As with other NED operations, you can only suspend entries included in your assigned SAC coverage. Clicking the "Suspend" button for an entry outside your coverage displays the popup message "This individual is not in your coverage" and you are prevented from suspending this person.)

5. Before submitting the suspension, set the effective date. The system assigns the current date as a default so if the suspension should be effective immediately, there's no need to change it. To create a scheduled action, enter the effective date or select one using the popup calendar.

6. Click the "Submit Status Change" button. A popup message asks if you're sure you want to suspend this individual. Click "OK" to complete the process or " Cancel" to abort. A confirmation message is displayed if the suspension is successful.

Transfer

The *Transfer* option is used to reassign a person to different IC, or in some cases, to a new organization within the same IC. You can also use transfer to change a person's classification. The transfer process consists of two steps: 1) An AO in the person's current IC changes their directory status to "transferring" and selects the IC into which they're transferring (if the transfer is to a new organization within the same IC, the person's current IC is selected.); 2) An AO in the "gaining IC" activates the person's record via the Activate option on the *Change Status* menu. To change a person's directory status to transferring:

1. Find the record of the person you want to transfer. From the *Main Menu*, select *Change Status*--> *Transfer*. A search page is displayed with fields for NIH ID, SSN, first name, and last name.

2. Enter information to be used for the search. There are no required fields, but a value must be entered in at least one of the fields. Search values are not case sensitive. Click the "Submit" button to initiate the search.

3. Review your search results. Search results are displayed under one of two categories: "Individuals Available to Transfer" or "Individuals Unavailable to Transfer" The former includes people in your IC with a directory status of

active or suspended. A "Transfer" button appears to the left of each of these names. Entries displayed under " Individuals Unavailable to Transfer" include entries for people whose current directory status is transferring, inactive entries, and people from other ICs regardless of their directory status.

4. If your search returns the person you want to transfer and the entry is "available to transfer," click the "Transfer" button next to the person's name. This will take you to the submit form.

(Note: As with other NED operations, you can only transfer entries included in your assigned SAC coverage. Clicking the "Transfer" button for an entry outside your coverage displays the popup message: "This individual is not in your coverage" and you are prevented from transferring this person.)

5. Select a "gaining IC" from the drop down list. If the person is moving to another organization within the same IC select their current IC. Transferring to a different organization within the same IC is called an "intra-IC" transfer.

6. Set the effective date for the transfer. The system assigns the current date as a default so if the transfer is to be effective immediately, there is no need to change it. To create a scheduled action, enter the effective date or select one using the popup calendar.

7. Click the "Submit Status Change" button. You are prompted to confirm that you want to change this person's directory status to transferring. Click "Cancel" to abort or "OK" to complete the process. In the case of a transfer to a new IC, an AO in the gaining IC is now able to activate the record in the new IC. In the case of an intra-IC transfer, the person can be activated and assigned to the new organization within their current IC.

Note: Except in the case of intra-IC transfers, changing a person's directory status to transferring causes their ID badge/card key building access to be disabled and the person will need to obtain a new ID badge/card key and have building access restored. In addition, previously authorized NIH Library privileges will be revoked and the person will no longer be listed in the NIH Telephone and Services Directory. Of course, Library privileges and listing in the Telephone Directory can be re-authorized.

Auto-Transfer

It is possible for a person to be automatically transferred in NED without any action being taken by an AO or AT. This is referred to as an "auto-transfer". Auto-transfers occur as a result of changes to records in systems that are connected to NED. Connected systems include the Human Resources Database (HRDB), the Fellowship Payment System (FPS2), and the John E. Fogarty International Center (JEFIC) database. As mentioned previously, NED runs an automated process that attempts to "link" records with corresponding records in connected systems. Once links are established, changes to records in connected systems may affect linked records in NED. Auto-transfers occur when a person's NED record is linked to a record in a connected system and the person's IC affiliation in the connected system changes. For example, if an NIH FTE's NED record is linked to a record in HRDB and the person's IC affiliation changes in HRDB, his or her IC affiliation will also be changed in NED.

Note: Auto-transfers cause a person's ID badge/card key building access to be disabled and the person will need to obtain a new ID badge/card key and have building access restored. In addition, previously authorized NIH Library privileges will be revoked and the person will no longer be listed in the NIH Telephone and Services Directory. Of course, Library privileges and listing in the Telephone Directory can be re-authorized.

Activate

The activate option is used to change a person's directory status to "active" from any other status (i.e., inactive, transferring, or suspended) and is very similar to the registration process. Activate is used most frequently by an AO in a gaining IC to complete the transfer process when a person moves to a different IC. The steps for changing a person's directory status to active are as follows:

1. From the *Main Menu* select *Change Status*--> *Activate*. The activation search form is displayed.

2. Select a "Classification" for the person being activated from the drop down list. Classifications, which are described in the following table include NIH FTE, Fellow, Guest, Contractor, Volunteer, and Tenant.

Classification	Description
NIH FTE	All NIH FTEs. Includes General Schedule (GS), Commissioned Corps, Senior Executive Service (SES), Senior Biomedical Research Service (SBRS), Special Expert, and Title 42 employees including Clinical/Research Fellows.
Fellow	All individuals who receive monthly stipends from NIH. Includes Intramural Research Training Award (IRTA) Fellows and Visiting Fellows
Guest	All non-paid individuals who work at NIH pursuing primarily their own interests. Includes Exchange Scientists, Guest Researchers, and Professional Services Contractors.
Contractor	Non-NIH employees who are paid by NIH for services rendered via a procurement vehicle.
Volunteer	All non-paid individuals who work for NIH primarily on NIH programs. Includes Special Volunteers.

Tenant	Employees of non-NIH organizations that lease and utilize NIH space. Includes on-site employees of the DHHS Office of the General Counsel (OGC) and the FDA Center for Biologics Evaluation and Research (CBER).

Table 8 - NED Classifications

3. If the person is a summer employee, click the "Yes" radio button.

4. Depending on the Classification of the person being activated, certain fields are required, unless an NIH ID is entered. Required fields are marked by "" appearing to the right of the field name. Required fields for an activation search are as follows:

Classification	Required Fields for an Activation Search
NIH FTE	First Name, Last Name, SSN, Date of Birth
Fellow	First Name, Last Name, and **EITHER** City of Birth, Country of Birth, Date of Birth **OR** SSN
Guest	First Name, Last Name, and **EITHER** City of Birth, Country of Birth, Date of Birth **OR** SSN
Contractor	First Name, Last Name
Volunteer	First Name, Last Name
Tenant	First Name, Last Name

Table 9 - Required Fields for an Activation Search

5. Enter values for all required fields, **or** the person's NIH ID, and click the "Submit" button to search NED to find the record for the person you want to activate. Search results are displayed under one of two categories: "Individuals Available to Activate" or "Individuals Unavailable to Activate. The former includes all inactive records, people in your IC with a directory status of suspended, and people with a directory status of transferring status who have been assigned to your IC by an AO in the person's current IC. An "Activate" button appears to left of these names. Entries displayed under the "Individuals Unavailable to Activate" category include all active entries, records for people outside your IC with a directory status of suspended, and people with a transferring status who have been assigned to other ICs. Activate buttons do not appear next to these names.

6. Review the search results. If the person you want to activate is displayed under the "available to activate" category,

click the "Activate" button. If the person is displayed under the "Individuals Unavailable to Activate" category you will need to contact an AO in the person's current IC and request that step #1 in the transfer process be completed. You will then be able to activate the person's record in your IC. To determine which AOs in the person's current IC can change the status to transferring, find the person's record using Search (View Only), click on their name from the search results screen and then on the "Display List" link to the right of the AO/AT Coverage field in the View Details page.

7. The Services page allows you authorize various NIH "services" for the person being registered. These include:

- ID Badge/card key
- List in paper directory (the NIH Telephone and Services Directory)
- NIH Library Privileges

ID Badge - NED is connected to the ORS ID badge/card key system and a person **must be authorized in NEDWeb to receive a badge**. Under the ID badge section of the Services form, the person's " badge status" is displayed as either "Authorized" or "Not Authorized" depending on the classification selected in step #2. When activating an NIH FTE or Fellow, badge status defaults to "authorized". Therefore, no action is required if the FTE or Fellow should receive a badge. If an NIH FTE or Fellow should not be authorized for a badge, select the "Do Not Authorize" radio button appearing below the ID badge "status line". When activating contractors, guests, volunteers, and tenants, badge status defaults to "Not Authorized." Therefore, for a contractor, guest, volunteer, or tenant to receive a badge, it is necessary to click the "Authorize" radio button. If a contractor, guest, volunteer, or tenant should not be issued a badge, leave the "No Change" radio button selected. When a badge is authorized, a default expiration date is calculated and inserted automatically in the "Expiration Date" field based on the classification of the person being activated. The default for FTEs and Fellows is four years and two years for all other classifications. For security reasons, badge expiration dates should coincide with how long the person will be working at NIH. To authorize an expiration date that is less than the calculated default, enter it in the Expiration Date field or select a date using the popup calendar.

List in Paper Directory - NED information is used to generate the Personnel Listing section of the NIH Telephone and Services Directory (i.e., the "paper directory"). When activating FTEs, Fellows, and tenants, the list in paper directory "status" defaults to "list". To list a contractor, volunteer, or guest, select the "List in paper directory" radio button.

NIH Library Privileges - NED is connected to the NIH Library's patron database and a **person must be authorized in NED** to obtain full Library privileges (e.g., the ability to check out materials). NIH FTEs are authorized by default to use the Library so no action is required. To authorize Library access for a Fellow, contractor, volunteer, guest, or tenant, click the "Authorize" radio button appearing below the NIH Library Access "Status" line.

After making your services selections, click " Continue" at the bottom of the screen to proceed with the activation.

8. Update any information on the *Personal Information* form that may have changed since the record was last active. Required fields are marked by "▸" appearing to the right of the field name. The following table lists the fields included on the *Personal Information* form and shows which are required based on the classification of the person being activated.

Field Name	Description	Required For Which Classifications?
First Name	Legal Given Name (free form text)	All
Last Name	Legal Surname (free form text)	All
Middle Name	Legal Middle Name (free form text)	None
Title	Mr, Mrs, Dr, etc. (drop down list)	NIH FTE, Fellow, Guest
Generation	Jr., III, etc. (drop down list)	None
Suffix	Professional designation or other descriptor; MD, PhD, RN, etc.	None
Preferred Name	Name other than legal name that the person is known by (e.g., Bob vs. Robert). **Note: This is the name that gets printed in the "paper directory."**	None
Other Name(s)	e.g., nicknames, maiden name (free form text)	None
Gender	M, F, or Unknown (drop down list)	NIH FTE, Fellow, Guest
SSN	Must be in format: 012-34-5678 or 012345678	NIH FTE
US Citizen	Y or N (radio button)	NIH FTE, Fellow, Guest
Date of Birth	Must be in format: 01/01/1968 or 01-01-1968	NIH FTE, Fellow, Guest
City of Birth	Free form	NIH FTE, Fellow, Guest
State of Birth	Drop-down list	None
Country of Birth	Drop-down list (defaults to "United States" if a state of birth is selected)	NIH FTE, Fellow, Guest
Comments	Additional information (free form text with 512 character limit)	None

Table 10 - Fields Included on the Personal Information Form

When finished entering information in the *Personal Information* form, click the *Work Information* tab to continue.

9. Update information on the *Work Information* form. As with personal information, certain fields are required based on the classification of the person being activated and the services selected in step #7. Required fields are marked by "▸" appearing to the right of the field name. The following table lists the fields included on the *Work Information* form and indicates which required based on the person's classification:

Field Name	Description	Required for Which Classifications?
Directory Status	Automatically set to "active" during an activation	All
Classification	NIH FTE, Fellow, Guest, Volunteer, Contractor, Tenant	All
Summer Employee	Yes or No (radio button)	All
EOD	"Entrance on Date." The date a person starts working at NIH. Must be in the format: 01/01/1968 or 01-01-1968	
NTE Date	"Not to Exceed" date. The date beyond which an appointment or employment tenure is not to exceed.	None
IC	NIH institute or center; (Automatically set to the IC of the AO or AT performing the activation.)	All
SAC	"Standard Administration Code", e.g., HNU14 (Selected from a drop down list, which only includes SACs in the AO or AT's currently assigned coverage.)	All
Organizational Unit	e.g., Network Systems Branch (Automatically set based on SAC)	All
IPD	Intramural Professional Designation (e.g., Senior Investigator, Postdoc Fellow)	All except Tenant when when an intramural SAC is selected
Org. Title	e.g., Lab Chief, Program Director	None
Phone	Must be in the format: 800-555-1212 (x1234 optional)	None
Fax	Must be in the format: 800-555-1212 (x1234 optional)	None
Mobile Phone	Must be in the format: 800-555-1212 (x1234 optional)	None

Pager	Must be in the format: 800-555-1212 (x1234 optional) or 104-1234 (a 7 following 1234 is optional)	None
TTY	Must be in the format: 800-555-1212 (x1234 optional)	None
Building	Selectable from a drop down list	None
Room	e.g., 4039, 2B345 (Free form, but room numbers for some buildings are validated.)	None
Mail Stop	e.g., 2551 (free form or can be selected from a list)	None
Delivery Address	for FedEx, UPS, etc. (max. 30 characters per line w/six lines)	None
Postal Address	for US Postal Service mail delivery (max. 30 characters per line w/six lines)	None
E-mail	jsmith@mail.nih.gov (free form, but must include "@")	None
Web Site URL	http://www.nih.gov (free form)	None
Contractor Affiliation	Company for whom the contractor works (free form); only displayed when the person's classification is contractor	Contractor
Contractor Phone	Must be in the format: 800-555-1212	None
AD Domain\User Name	Used for NIH Login and cannot be added during an activation. May be automatically populated by the daily NED/AD sync program. If not, this must be added/updated by the NIH Help Desk.	None

Table 11 - Fields Included on the Work Information Form

Based on the services selected for the person in step #7, certain fields become required. These are marked by "▸" appearing to the right of a field name. The following table summarizes the required information for each service:

Field Name	ID Badge	List in Paper Directory	NIH Library
Work Phone	Y	Y	Y
Building	Y	Y	Y
Room	Y	Y	Y
Mail Stop Code		Y	

Table 12 - Required Fields for Services

When finished entering information on the *Work Information* form, click the *Home Information* tab.

10. Update any information on the *Home Information* form that may have changed since the person was last active. There are no required fields on this form. The fields included on the *Home Information* form are summarized below.

Field Name	Description	Required for Which Record Types?
Home E-mail	janedoe@aol.com (Free form, but must include "@")	None
Home Phone	Must be in the format: 800-555-1212 (x1234 optional)	None
Home Fax	Must be in the format: 800-555-1212 (x1234 optional)	None
Home Mobile Phone	Must be in the format: 800-555-1212 (x1234 optional)	None
Home Pager	Must be in the format: 800-555-1212 (x1234 optional)	None
Home Mailing Address	Maximum 30 characters per line with six lines	None
Emergency Contact Name	Free form	None
Emergency Contact Phone	Must be in the format: 800-555-1212	None
Emergency Contact Description	Free form	None

Table 13 - Fields Included on the Home Information Form

When finished entering information on the *Home Information* form, click "Continue" at the bottom of the form to proceed.

10. Note: This step applies only to Administrative Technicians. Administrative Officers proceed to step #11. In cases where multiple AOs have SAC coverage over the person being activated, you are presented with a list of names. Select the approving AO for this activation request and click "Continue". If only one AO has SAC coverage for the person being activated, no selection list is displayed and the request will be automatically routed to this person.

11. From the submit page, you have the option of verifying your work. (Note: If required information has been omitted from any of the fields an "Oops" warning page is displayed and you'll be unable to continue until this information has been provided.) Verification is optional--proceed to step #12 if you do not wish to verify the information that has been entered. To verify information, check the appropriate box (All, Services, Personal, Work, or Home) and click "Verify" to display the information that you have entered. If satisfied, click the "Confirm" button at the bottom of the page. To add or change information, click "Modify" and proceed to the appropriate form (Services, Personal, Work, or Home) to

make the necessary changes. Click the "Continue" button at the bottom of any page when finished.

12. Set the effective date for the activation. The current date is assigned by default so no action is required if the activation is to be effective immediately. To create a scheduled action, enter the effective date or select one using the popup calendar.

13. Click the "Submit Update" button. If you are an AO, the person's NED entry is activated. If you are an AT, the activation request is moved to the reviewing AO's pending request queue and the AO is notified via email that your request has been submitted.

Review Requests

Pending Requests (AOs)

AOs are responsible for reviewing "requests" (e.g., registrations, updates, status changes) that have been submitted by ATs. This is done by selecting the *Review Requests* option on the NEDWeb *Main Menu*. Requests that have been submitted, but not yet acted upon, are called "pending requests". A pending request remains in an AO's "queue" until it is either approved, rejected, or returned to the AT for modification. After one of these three actions has been taken, the pending request is removed from the AO's queue. When approving requests, AOs have the option of scheduling them for a future date. These are referred to as "scheduled actions".

If an AO has pending requests in their queue, a notification message appears on the Main Menu when they login to NEDWeb. AOs are also notified via email when ATs submit requests. In reviewing Pending Requests, AOs can chose one of the following actions:

- Approve the request without making any changes (NED is updated).
- Reject the request (NED is not updated and all information entered by the AT is lost)
- Return the request to the AT for modification (NED is not updated, but information entered by the AT is retained as part of the "returned request").
- Approve the request after making any necessary changes themselves (NED is updated).

To review requests when logged in as an AO, select *Review Requests* from the *Main Menu*. The following buttons appear to the left of each pending request: Approve, Reject, and Return to AT. These correspond to actions 1-3 described above. You might select one of these actions if you've already reviewed the request via the e-mail notification you received when the request was submitted by the AT. To review the details of the request now, click the person's name to display this information. Buttons for options 1-3 above are displayed at the bottom of this page along with a "Modify" button. Clicking "Modify" takes you to the Personal Information form and allows to you to make changes the same way you would do during an Update.

Approved Scheduled Actions (AOs)

Registrations, updates, and status changes (deactivations, transfers, suspensions, activations) can be "scheduled" to occur in the future by entering a future date in the "Date to Execute Changes" text box that appears on the screen used for submitting actions. Once approved, these actions become "Scheduled Actions" and appear in the approving AO's review requests area under the heading *Approved Scheduled Actions*. A message reminding AOs that they have Approved Scheduled Actions is displayed on the *Main Menu*. The approving AO can modify, delete or return to the submitting AT an Approved Scheduled Action prior to execution by clicking buttons appearing to the left of the Approved Scheduled Action. Details of a scheduled action can be viewed by clicking the person's name. To change the execution date of an Approved Scheduled Action, click the *Modify* button, enter a new date on the submit page and re-submit the action. **Note: scheduled Actions are not reflected in NED until approximately 5:30 a.m. on the scheduled date!** Therefore, if you search for a person whose registration is scheduled for two weeks into the future, you won't find them in NED until that date at about 5:30 a.m.

Returned Requests (ATs)

As mentioned above, an AO can return a pending request to the AT who submitted it. Once returned to the AT, it is called a "returned request". ATs are notified via email when AOs return requests. A reminder message also appears on the *Main Menu* indicating the AT has returned requests. Returned requests are accessed by selecting the *Review Requests* option on the NEDWeb *Main Menu*. ATs can modify or delete returned requests by selecting buttons appearing to the left of the person's name. After making the necessary modifications, returned requests can be re-submitted to AOs.

Pending Requests (ATs)

Pending requests remain in an AT's queue until acted upon by the AO. To view Pending Requests awaiting AO approval, select *Review Requests* from the *Main Menu*. ATs can perform the following actions on a Pending Request by clicking buttons displayed to the left of a request:

- Modify the request (the request remains in the current AO's queue). To do this, click the "Modify" button to the left of the person's name and follow the steps for an Update.

- Reassign the request to another AO. To do this, click the "Change AO" button to the left of the person's name, select a new AO from the drop list, and click " Continue".
- Delete the request from the AO's queue (all previously inputted information is lost). To do this, click the "Delete" button to the left of the person's name.

Administration

Selecting the *Administration* option on the *Main Menu* allows AOs to perform the following functions within their IC **(Note: ATs do not have access to administrative functions)**.

AO Maintenance:
- List AOs
- Create an AO
- Modify an AO
- Delete an AO

AT Maintenance:
- List ATs
- Create an AT
- Modify an AT
- Delete an AT

Miscellaneous:
- Batch Update

AO Maintenance

List AOs

The *List AOs* option on the *Administration* menu lists people who are currently setup as AOs in your IC. Clicking the "View Coverage" button next to a name displays the SAC coverage for that individual.

Create an AO

The *Create an AO* option on the *Administration* menu allows you to setup a new AO in NEDWeb. Enter the name of the person you want to make an AO and select the SACs to include in their coverage. Only SACs included in your own coverage are displayed. This means that you cannot assign a SAC that is outside your own coverage area. After clicking the "Submit" button, the person's name is displayed with a "Make AO" button appearing to the left of their name. Click "Make AO" to complete the process. A confirmation message will be displayed indicating which SACs have been assigned to this person.

Modify an AO

The *Modify an AO* option is used to add or delete SACs from an existing AO's coverage. To modify an AO's SAC coverage, select *Modify an AO* from the *Administration* menu to display a list of people who are currently setup as AOs in your IC. Click the "Modify Coverage" button to the left of a name to modify the person's SAC coverage. The AO's current SAC coverage is displayed along with a list of additional available SACs that can be assigned. Since you cannot assign a SAC to another AO unless it's included in your own coverage the list of available SACs includes only those included in your current coverage that not already assigned to the AO. To add coverage, highlight one or more of the available SACs and click the "Add SACs" button. To delete coverage, highlight one or more of the existing SACs and click the "Delete SACs" button. (Note: multiple SACs can be selected by holding down the "Ctrl" key and simultaneously clicking the desired SAC with your mouse). If you attempt to add a SAC with a lower hierarchical value than one that's already assigned to this person, a popup message is displayed saying this is not allowed. For example, if an AO's current SAC coverage includes "HNU1," attempting to add "HNU12" will result in the popup message. When you have finished selecting the desired SACs for this AO, click the "Modify AO" button to update their coverage. A confirmation is displayed listing the SACs now included in the AO's coverage.

Delete an AO

The *Delete an AO* option removes all SAC coverage and deletes the person as a NEDWeb user. Select *Delete an AO* from the *Administration* menu to display a list of people who are currently setup as AOs in your IC. To delete an AO, click the "Delete All Coverage" button to the right of the person's name. The AO's current SAC coverage is displayed along with a warning message indicating that you are about to remove them as an AO. If you are sure, click "Delete Coverage" to complete the process. Clicking "Cancel" aborts the process. (Note: An AO is automatically deleted as a NEDWeb user when their NED record is deactivated. However, AOs with pending requests in their queue cannot be deactivated. These must first be approved or rejected by the AO, or reassigned by the submitting AT to another AO.)

AT Maintenance

List ATs

The *List ATs* option on the *Administration* menu displays a list of people who are currently setup as ATs within your IC. Clicking the "View Coverage" button next to a name displays the SAC coverage for that individual.

Create an AT

The *Create an AT* option on the *Administration* menu allows you to setup a new AT to use NEDWeb. Enter the name of the person you want to make an AT and select the SACs to include in their coverage. Only SACs included in your own coverage are displayed. This means that you cannot assign a SAC that is outside your own coverage area. After clicking the "Submit" button, the person's name is displayed with a "Make AT" button appearing to the left of their name. Click " Make AT" to complete the process. A confirmation message will be displayed indicating which SACs have been assigned to this person.

Modify an AT

The *Modify an AT* option is used to add or delete SACs from an existing AT's coverage. Click the "Modify Coverage" button to the left of a name to modify the person's SAC coverage. The AT's current SAC coverage is displayed along with a list of additional available SACs that can be assigned. Since you cannot assign a SAC to another AT unless it's included in your own coverage the list of available SACs includes only those included in your current coverage that not already assigned to the AT. To add coverage, highlight one or more of the available SACs and click the "Add SACs" button. To delete coverage, highlight one or more of the existing SACs and click the "Delete SACs" button. (Note: multiple SACs can be selected by holding down the "Ctrl" key and simultaneously clicking the desired SAC with your mouse). If you attempt to add a SAC with a lower hierarchical value than one that's already assigned to this person, a popup message is displayed saying this is not allowed. For example, if an AT's current SAC coverage includes "HNU1," attempting to add "HNU12" will result in the popup message. When you have finished selecting the desired SACs for this AT, click the "Modify AT" button to update their coverage. A confirmation is displayed listing the SACs now included in the AT's coverage.

Delete an AT

The *Delete an AT* option removes all SAC coverage and deletes the person as a NEDWeb user. Select *Delete an AT* from the *Administration* menu to display a list of people who are currently setup as ATs in your IC. To delete an AT, click the "Delete All Coverage" button to the right of the person's name. The AT's current SAC coverage is displayed along with a warning message indicating that you are about to remove this person as an AT. Click "Delete Coverage" to complete the process or "Cancel" to abort. (Note: Deactivating an AT's record automatically removes all SAC coverage and removes their AT status. However, ATs with pending requests in their queue cannot be deactivated. This means that pending requests must first be approved or rejected by AOs before the AT's record can be deactivated.)

Reports

NEDWeb's extensive reporting capabilities are described below. All reports are available to both AOs and ATs. To run a report, click the *Reports* option on the *Main Menu* and select one of the following reports from the drop down list:

- User Defined
- Change Log
- SAC Coverage
- List SACs
- List NICs
- View All Requests

User Defined

The NEDWeb user-defined report generator is a powerful tool that allows AOs and ATs to create custom reports on demand. **(Note: Registrations and updates in NED are not immediately reflected in user defined reports because the report generator uses a separate database. NED information is imported twice daily into the reports database, once at 1:00 a.m. and again between noon and 2:00 p.m. depending on IC. This means that registrations and updates performed in the morning won't appear in user defined reports until the afternoon and updates performed in the afternoon won't be reflected until the following morning.)** In creating user defined reports, you can determine which fields to include, the order of columns, which records to include, and how the data will be sorted. In addition, user defined reports can either be viewed on screen or sent as an email attachment as an Excel spreadsheet or Word document.

To create a user defined report, select the *Reports* option on the *Main Menu*, then "User Defined" from the drop down list. Follow the step-by-step instructions that are displayed on the report screens.

Change Log

The *Change Log* report allows an AO or AT to view all updates that they made to a person's record in NEDWeb over a defined period of time. In addition, NICs have the added capability of viewing all NEDWeb updates to a person's record over a defined period of time. To create a Change Log report, select the *Reports* option on the *Main Menu*, then

"Change Log" from the drop down list. Criteria that can be used for creating a Change Log report include: NIH ID, request status (e.g., pending, completed, scheduled) and start/end date. After entering your criteria, click "Submit" to generate the report. Change Log entries are displayed chronologically beginning with the most recent activity. The report is formatted so that all information pertaining to a particular "action" (e.g., registration, update, status change) is grouped together and actions are separated by horizontal lines. The following information is displayed for each action:

- *Directory Entry* - First name, last name, and NIH ID associated with the entry.
- *Submitted By* - First name, last name, and NIH ID of the person who entered the action. This can be either an AT or an AO.
- *Date Submitted* - If submitted by an AT, this reflects the date and time the action was submitted to the AO for review; if submitted by an AO, the date and time that NED was updated.
- *Approving AO* - First name, last name, and NIH ID of the AO who approved the change. For actions entered directly by an AO, this will be the same as "Submitted By."
- *AO Action Date* - Date and time NED was updated. For actions submitted by an AO, this will be the same as "Date Submitted."
- *Status* - Current status of the action, which will be one of the following:

  Complete - The action was approved and NED has been updated.
  Pending - The action has been entered by an AT and submitted to an AO for review, but not yet acted upon.
  Returned to AT - The action has been returned by the AO to the submitting AT.
  Scheduled - The action has been approved by an AO and NED will be updated on a future date.
  Rejected - The action was rejected by an AO and NED was not updated.

- *Directory Modified* - For completed actions, displays the date and time NED was updated. This will be the same as the "AO Action Date" unless the change was scheduled, in which case it will be later than the AO Action Date.
- *Change Summary* - Provides the details of an action, including both the new and old values.
- *Scheduled Date* - Displays the scheduled date for previously approved scheduled actions. Not applicable for actions that were not scheduled.

SAC Coverage

This report displays people included in your current SAC coverage. You can list all people in your coverage or filter records based on directory status, classification, and SAC.

List SACs

Displays a list of SACs in NEDWeb for each IC. In addition to SAC, the corresponding organizational unit and SAC status (active or inactive) is displayed. Inactive SACs are generally those that were in use prior to an IC's reorganization and cannot be assigned to a person during a registration or update. NEDWeb obtains SAC information from the Human Resources Database (HRDB) in which occasionally a SAC will be marked as inactive, but is still in use by the IC. In such cases, please contact the NIH Help Desk (301-496-HELP) for assistance.

List NICS

Displays a current list of NED IC Coordinators (NICs)with their telephone numbers and e-mail addresses. This is also where a NIC reassigns their NIC status to another AO or AT within the IC. When a current NIC accesses the list, their name is displayed as a hyperlink. Clicking this link displays a current list of AOs and ATs with a "Make NIC" button appearing to the left of each name. The current NIC transfers his or her NIC status to another AO or AT in the IC by clicking the "Make NIC" button. This displays a popup asking if they're sure they want to transfer their NIC status. Clicking "OK" completes the process. New NICs are automatically assigned SAC coverage for the entire IC.

View All Requests

Lists all pending requests and scheduled actions for your IC. Pending requests and approved scheduled actions are grouped separately in the report.

E-Mail Notification

NEDWeb features event driven email notification. Email is sent when the following events occur:

- AOs are notified when ATs submit requests for review.
- ATs are notified when AOs act on pending requests (e.g., approve, reject, or return to the AT).
- Approving AOs are notified when scheduled actions execute.
- AOs are notified when ATs delete pending requests or resubmit them to another AO.
- Gaining IC NICs are notified when a person is put into transferring status.
- NICs are notified when an AO creates a new AO or AT, modifies the coverage of an existing AO or AT, or deletes an existing AO or AT.

"NED Administrator" appears in the "From" line of e-mail notifications. **Note: Using the "Reply" function in your email program sends a reply to "NED Administrator". To send a reply to an AO or AT, you must enter their**

email address in the "To" line of your message.

Appendix A - Glossary

Administrative Officer (AO) - As defined in NED, an AO is a person who has been authorized to access NEDWeb with the ability to write changes directly to NED. AOs are also responsible for reviewing and approving information entered by Administrative Technicians (ATs).

Administrative Technician (AT) - As defined in NED, an AT is a person who has been authorized to access NEDWeb, but without the ability to write changes directly to the database. Changes entered by ATs must be submitted to AOs and approved before they are written to NED.

Classification - A "worker type" that is assigned to every person in the directory when they are registered or activated. Choices include: FTE, Fellow, contractor, guest, volunteer, or tenant.

Deactivation - The process of changing a person's directory status from to active to inactive when they leave NIH.

Directory Status - Represents the current "state" of a directory entry. Choices include: "active" (the person is currently working at NIH), "inactive" (the person is no longer working at NIH), "transferring" (the person is in the process of being transferred to another IC, or moving from one organization to another in the same IC), or "suspended" (the person's capabilities within the NIH system are limited or disabled while under review).

Pending Request - A registration, update, or change of status entered by an AT that has been submitted to an AO for review, but not yet acted upon. When there is a pending request for an entry it cannot be updated, although the pending request itself can be modified by either the submitting AT or the AO to whom it was submitted.

Registration - The process of adding a new person to NED.

Returned Request - A registration, update, or change of status request submitted by an AT that has been returned by the reviewing AO for modification by the AT. When there is a returned request for an entry it cannot be updated, although the returned request itself can be modified by the AT to whom the request was returned.

SAC Coverage - SAC stands for "standard administration code" and represents an organizational unit within an IC. Every person in NED has a SAC. When new AOs or ATs are setup to use NEDWeb, they are assigned one more SACs as part of their "SAC coverage". They are then limited to working with entries for people that are within their SAC coverage. For example, an AO with a SAC coverage limited to HNU1 would not be able to update a NED entry with the SAC HNU2. An AO or AT's SAC coverage can be modified by the NED IC Coordinator, or in some cases, by another AO.

Scheduled Action - A registration, update, or change of status that has been approved by an AO and scheduled for a future date. Scheduled actions are automatically executed on the scheduled date at approximately 5:15 a.m. Information entered as part of a scheduled action does not appear in NED until the scheduled date. For example, if you search NED for a person who is scheduled to be registered a week from today, you will not find their record until then. Records cannot be updated when a action is scheduled unless the action is a scheduled deactivation.